

Consortium for Service Innovation

Member Rules of Conduct

Revised April 1, 2016

General

The Consortium is a collaborative body working for the benefit of its members. The Consortium's focus is to improve its members' abilities to optimize customer engagement and interaction.

Our objective is also to position our members as leaders in their respective industries. The following guidelines will help us to supply you with quality public relations opportunities while strengthening, clarifying, and protecting the Consortium's intellectual property, trademarks and standards. Failure to comply with our Member Rules of Conduct may result in limitations on a member's activities or termination of membership.

Content

Scope and Focus of Consortium Communications

Consortium news releases, statements and speeches will be focused on the following subjects:

- initiatives of the Consortium
- strategies, business models, standards, and operational guidelines that advance the state of the art in customer support
- member best practices and case studies
- new member and alliance announcements

Anti-Trust Considerations

The Consortium encourages collaboration among members in order to help advance the understanding and practices for knowledge management, collaboration and customer engagement. For the same reason, the Consortium prohibits collusion and other activities, as required by anti-trust law.

Collaboration

Cooperation does not violate anti-trust laws if it is for the purpose of creating a new product or new market that has a positive effect for customers. Within the Consortium, competitors can discuss and identify:

- the flow of information between vendors
- rules or guidelines for participating in the market for solutions

Collusion

Members that are in competing businesses will avoid product/service related discussions and actions that may result in limiting competition or fixing prices. They will refrain from:

- price discussions
- allocating customers
- dividing up markets
- discussing specific future products or services, features or packaging

- discussing company-specific future plans such as “Where are you headed?” “What do you see (in terms of products and services) in the future?” and “Are you going to continue to do this?”

Intellectual Property

Intellectual property including concepts, models, and processes developed in Consortium working groups, web sessions, conferences, committees, and other forums will be the property of the Consortium and for the benefit and use of its members.

Members must respect the intellectual property rights of other member companies as well as the intellectual property rights of the Consortium. Members may not use Consortium trademarks without prior permission from the Consortium and the trademarks may only be used as directed by the Consortium. Improper or unauthorized use of the Consortium trademarks or other members’ intellectual property may result in immediate termination of membership.

Member Sales to Other Members

Members will not make unsolicited sales presentations or unsolicited phone calls to set up sales presentations to other members. During meetings, member sales activities will be restricted to specific times, functions, and designated areas as defined by the Consortium.

Communications

Consortium Communications

All communications generated by the Consortium will be developed and released through the office of the Executive Director. When referencing members in new releases, interviews, and speeches, the Consortium will observe the following protocol.

Listings

Members will be listed in alphabetical order within each listing group. A group may consist of general members, specific committees, etc.

Quotations and Editor Interviews

As a rule, members will be quoted in Consortium communications on a rotating basis within topic areas defined by the Consortium. Quotes will come from Benefactor- and Sponsor-level members, companies that sit on the board, and occasionally from other member companies.

The Consortium reserves the right to quote members’ specific accomplishments or contributions.

Press interviews with members will also be handled on a rotating basis within topic areas. Member participation will be subject to availability, since editors are frequently on deadline and must have immediate access to sources for quotes. Interviews at conferences and conventions will also be handled on a rotating basis, subject to member availability at the time of the interview.

Member Communications

Any public communication by a member about the Consortium, and any use of Consortium trademarks or service marks, must be approved in writing by the office of the Executive Director prior to release. The Consortium will respond within five business days to such requests. To ensure accuracy, the Consortium reserves the right to require changes to such communications.

Exceptions to this are all “approved for member use” Consortium materials. These include descriptions of the Consortium, Knowledge-Centered Service (KCSsm), Intelligent Swarming, the Customer Success Initiative, the Leadership Framework for Service Excellence and other initiative names or concepts that members may use in explaining the Consortium and its initiatives or services.

Any member company which implies through its conduct or communications, that its product or service has been endorsed by the Consortium, without prior written consent from the Consortium, will be asked to cease such activity immediately. [The KCS Academy](#) is the certifying body designated by the Consortium for KCS. The Academy offers Certification programs for people, the KCS *Verified* for knowledge management tools that support the KCS Practices, and the KCS *Aligned* program for tools and services that compliment KCS.

Member Behavior

The Consortium expects that all members (or others who might be allowed to participate in membership activities) will deal with each other and the Consortium's staff in a professional and respectful manner. Among other things, the Consortium will not tolerate discrimination or harassment based on characteristics that are protected under applicable law, like sex, race, national origin, etc. Concerns regarding discrimination, harassment, or other unprofessional or disrespectful behavior are to be shared with the Executive Director. Membership benefits may be restricted or discontinued for engaging in such behavior.

Inaccurate Information

If inaccurate information is published or broadcast concerning the Consortium, its intellectual property, or relationships, the Consortium will vigorously act to clarify its position. This will protect the intellectual property of the Consortium from misrepresentation or dilution, and make all of our efforts more effective in shaping the future of customer support and the customer experience.

Approvals

Please send requests for approval of Consortium-related communications to Kelly Murray at kmurray@serviceinnovation.org.